

Getting started with the course

Tracking and measuring project progress

Managing changes, risk and dependencies

Communicating issues to stakeholders

Video: Escalating issues

3 min

Video: Communicating changes to the team

3 min

Reading: Writing an effective escalation email

10 min

Practice Peer-graded Assignment: Activity: Create an escalation email

1h

Review: Introduction to project execution

Writing an effective escalation email

In this lesson, you are learning how to communicate risks and changes to your team and stakeholders. In the previous video, you were introduced to **escalation**: the process of enlisting the help of higher level project leadership or management to remove an obstacle, clarify or reinforce priorities, and validate next steps.

There are many ways to escalate a risk, and it is important to set escalation standards with your stakeholders before beginning work on a project. In this reading, we will focus on the **escalation email**, and go over best practices for writing one.

Escalation email best practices

All projects—even those managed by experienced project managers—occasionally have problems. Your role as the project manager is to help resolve problems and remove barriers that prevent your team from making progress toward your goals. While many problems might be small enough to resolve within your core team, other problems—like a major change in your budget or timeline—may need to be brought to stakeholders for a final decision. Detailing these problems, their potential impact, and the support you need in a clear and direct email to your audience can be an effective communication tool.

Effective escalation emails:

- Maintain a friendly tone
- State your connection to the project
- Explain the problem
- Explain the consequences
- Make a request

Let's discuss these five keys to writing a strong escalation email.

Maintain a friendly tone

When drafting an escalation email, you may feel tempted to get straight to the point, especially when dealing with a stressful and time-sensitive problem. But keep in mind that it is important to address issues with grace. Consider opening your email with a simple show of goodwill, such as "I hope you're doing well." When describing the issue, aim for a blameless tone. Above all, keep the email friendly and professional. After all, you are asking for the recipient's help. Be sure to close your email by thanking the recipient for their time.

State your connection to the project

Introduce yourself early in the email if you have less familiarity with the project stakeholders. Be sure to clearly state your name, role, and relationship to the project. This helps the reader understand why you are reaching out. Keep your introduction brief and to the point—a single sentence should suffice. If you know the person on the receiving end of the escalation email, you can simply reinforce your responsibility on the project before getting straight to the problem.

Explain the problem

Once you greet your recipient and briefly introduce yourself, explain the issue at hand. Clearly state the problem you need to solve. Provide enough context for the reader to understand the issue, but aim to keep your message as concise as possible. Avoid long, dense paragraphs that may obscure your message and tempt the reader to skim.

Explain the consequences

After explaining the problem, clearly outline the consequences. Describe specifically how this issue is negatively impacting the project or how it has the potential to negatively impact the project later in the project timeline. Again, keep your explanation concise and your tone friendly.

Propose a course of action and make a request

This is the central piece of a strong escalation email. In this section, you propose a solution (or solutions) and state what you need from the recipient. A thoughtful solution accompanied by a clear request lets the recipient know how they can help and moves you toward a resolution.

Putting it all together

Let's see how these best practices come together to form a strong escalation email. In the scenario that prompts the email, Sayid, a project manager from a company that sells gift baskets, is having a quality control issue with one of the items in a line of holiday baskets. If the issue is not rectified soon, the product launch will have to be delayed and the company will lose money. In the annotated email example below, Sayid explains the issue to his internal stakeholders and requests a meeting with them.

To:	knelson@graciousgiftbaskets.com, gabrielmendoza@graciousgiftbaskets.com <i>[Your stakeholders]</i>
Subject:	<i>[Action required]</i> Decision needed to make progress on Holiday Scents project
<p>Hi Karen and Gabriel,</p> <p><i>[Keep it friendly and state your connection to the project]</i> I hope you are doing well. As you may know, I have been managing our Holiday Scents product line, which is scheduled to launch in October.</p> <p><i>[Explain the problem]</i> I would like to bring an issue to your attention. The baskets in this product line will include scented candles, and we placed an order with Candlemakers, Inc. for 5,000 candles to be delivered to the warehouse by Friday to prepare for our first customer shipment. To date, we have received 3,000 of the 5,000 candles. Unfortunately, many of the candles we have received so far fail to meet our quality standards. The packaging is damaged, or the candles themselves are broken.</p> <p><i>[Explain the consequences]</i> This puts our customer satisfaction rates at risk. Failure to meet the quality requirements for the candles by Friday will result in postponing the product launch by three weeks. If this delay occurs, we will incur an additional cost of \$20,000 because we will need to order a new shipment of candles and review the quality standards of each to ensure that they meet our contractual agreements.</p> <p><i>[Propose a course of action and make a request]</i> I have sourced two backup suppliers that have five-star reviews and a track record of on-time deliveries. I propose we meet with them both right away so we can onboard one of them quickly. That way, we can avoid major delays. Are you available for a meeting tomorrow to discuss options and come to an agreement on next steps? Please respond with the times that work best for you.</p> <p>Thank you in advance for your consideration and insight, Sayid</p>	

Alternate text of email:

To: knelson@graciousgiftbaskets.com, gabrielmendoza@graciousgiftbaskets.com *[Your stakeholders]*

Subject: *[Action required]* Decision needed to make progress on Holiday Scents project

Hi Karen and Gabriel,

[Keep it friendly and state your connection to the project]

I hope you are doing well. As you may know, I have been managing our Holiday Scents product line, which is scheduled to launch in October.

[Explain the problem]

I would like to bring an issue to your attention. The baskets in this product line will include scented candles, and we placed an order with Candlemakers, Inc. for 5,000 candles to be delivered to the warehouse by Friday to prepare for our first customer shipment. To date, we have received 3,000 of the 5,000 candles. Unfortunately, many of the candles we have received so far fail to meet our quality standards. The packaging is damaged, or the candles themselves are broken.

[Explain the consequences]

This puts our customer satisfaction rates at risk. Failure to meet the quality requirements for the candles by Friday will result in postponing the product launch by three weeks. If this delay occurs, we will incur an additional cost of \$20,000 because we will need to order a new shipment of candles and review the quality standards of each to ensure that they meet our contractual agreements.

[Propose a course of action and make a request]

I have sourced two backup suppliers that have five-star reviews and a track record of on-time deliveries. I propose we meet with them both right away so we can onboard one of them quickly. That way, we can avoid major delays. Are you available for a meeting tomorrow to discuss options and come to an agreement on next steps? Please respond with the times that work best for you.

Thank you in advance for your consideration and insight,

Sayid

End of email

Key takeaway

In this example, Sayid maintains a friendly tone, clearly explains the problem and its potential consequences, and makes a clear request of the recipients. The email is also brief and to the point.

To recap, effective escalation emails apply these five best practices:

- Maintain a friendly tone
- State your connection to the project
- Explain the problem
- Explain the consequences
- Make a request

Escalation is a useful skill for solving problems quickly, and sending a strong escalation email that applies these best practices can help get your team the help it needs.

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